



ERP Consulting
Web Development
Custom Programming Solutions
Desktop & Web Applications for Manfact

NorthClark Computing, Inc.

Part Number Search Query User Guide

Web and Desktop Applications
for Manfact by Epicor

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TABLE OF CONTENTS

INTRODUCTION..... 1

PART NUMBER SEARCH QUERY 1

 LOCATING A PART NUMBER (SEARCH TAB) 1

 SEARCH RESULTS 2

 ENGINEERING 3

 PLANNING..... 5

 MATERIAL 7

 PURCHASING..... 9

 MARKETING..... 11

 ON HAND..... 12

 SELECTING INVENTORY LOCATIONS 14

GENERAL INFORMATION 15

 MAIN MENU OPTIONS..... 15

 RIGHT CLICK MENU 15

 PRINTING A SPREADSHEET 16

 EXPORTING A SPREADSHEET TO EXCEL 17

 EDITING FEATURES 18

 CUSTOMIZING YOUR DISPLAY / ARRANGING COLUMNS 19

 WILDCARDING 20

 SECURITY 20

Introduction

NorthClark's Part Number Search Query may be used to locate Part Numbers in your Manfact system using a variety of search criteria.

Environment

The main screen is composed of eight "tabs". The Search and Results tab are the two tabs that will be utilized in locating a part number. The remaining tabs display information that is contained in the Manfact PARTS and Inventory files, organized by departments: Engineering, Planning, Material, Purchasing, Marketing and On Hand.

Part Number Search Query

Locating a Part Number (Search Tab)

If you know the Part Number that you want to inquire on, you can simply enter it and press the Enter key, and you will be immediately directed to the Engineering tab. If you don't know the specific part number, but know some basic information about the item, several fields are available to use in narrowing your search.

The screenshot shows the 'Part Number Search' application window. The window title is 'Part Number Search'. The menu bar includes 'File', 'Edit', 'View', and 'Help'. The toolbar contains icons for file operations and help. The main area has eight tabs: '1-Search', '2-Results', '3-Eng.', '4-Planning', '5-Material', '6-Purch', '7-Mrk', and '8-On Hand'. The '1-Search' tab is active and contains the following fields: 'Part Number:', 'Vendor#:', 'Part Type:', 'Description:', 'Prod Class:', 'Category:', 'Vendor Desc:', 'Sub Class:', 'Buyer:', 'Mfg#*Part#:', 'Make/Buy:', 'Planner:', and 'Notes:'. There is also a checkbox for 'Exclude Parts Flagged for Deletion'. At the bottom, there are buttons for 'Clear', 'Search', 'Help (F1)', and 'Exit'. The status bar shows the database path 'C:\DOCUME~1\owner\LOCALS~1\Temp\NCC_PartsQ\PartsList.mdb' and the account name 'MDEM05.11'.

The fields you may use in your search include: Part Number, Description, Vendor Description, Mfg#*Part#, Notes, Vendor #, Product Class, Sub-Class, Part Type, Category, Buyer, Planner, and Make/Buy Code. You can even List the Location Contents of a specific stock inventory location and if

you use bin locations, the bin location detail will be displayed. In addition you may exclude parts that have been flagged for deletion.

Note, when searching on Part Description, eliminate all characters that are not letters or numbers (spaces, dashes, slashes, etc.). This should increase the probability of finding a match, and reduce the likelihood of creating duplicate part numbers.

If you don't know the specific details of a particular field, you might use wildcarding to enter only a portion of the item's part number, description, etc.

To further assist you in locating the desired part number, you may Sort the search results by either the Manfact Part Number or the Engineering Description.

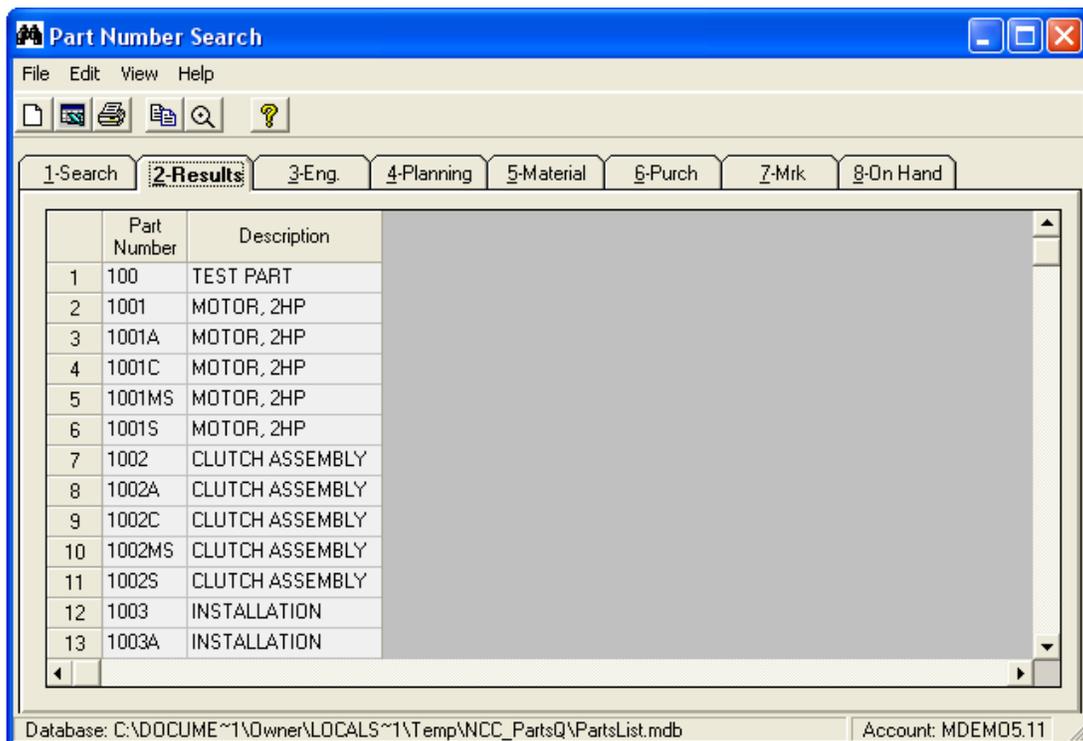
After you have entered all of the desired search fields, click the [Search] button.

Search Results

After you choose the [Search] command, the results are displayed on Tab 2 "Results". One part number and its associated description are displayed on each row of the list.

There are two ways you can select an item from the list:

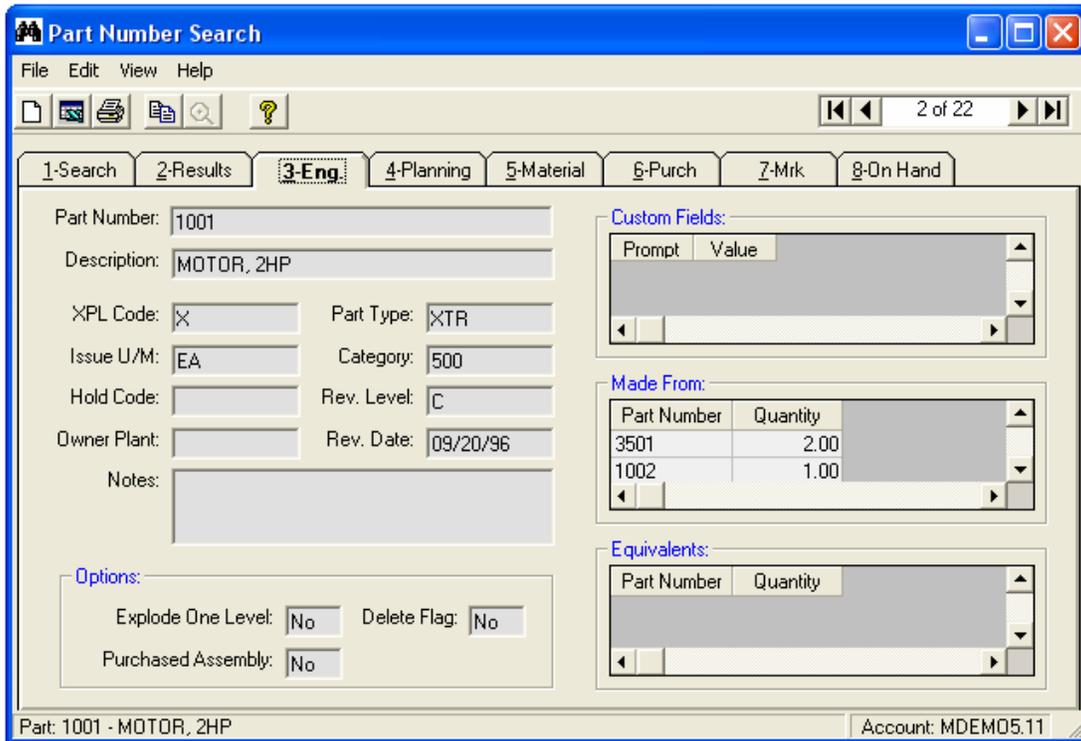
- ❑ Position the highlight bar over the desired part number using the arrow keys, or by clicking anywhere on the row with mouse, then click the [Select] button at the bottom of the screen.
- ❑ Double-click on the desired row using the left mouse button.



Note: if your search resulted in only one part number, the Parts information will be shown automatically, so there is no need to select anything.

Engineering

This view displays Engineering and other descriptive information about the Part.



Below are descriptions of the fields displayed on the Engineering view.

Part Number	The selected part number.
Description	The name or a brief description of the item.
XPL Code	The explode code assigned to the part number you selected: X = Assembly (Explode) XP = Phantom Assembly (Blow Through) Blank = Component (no bill of material) L = Line Stock
Issue U/M	The unit of measure by which each part will be issued or stocked.
Hold Code	The hold code assigned to the part you selected

	<p>D = Discontinued, no orders recommended.</p> <p>U = Use up remaining stock.</p> <p>O = Obsolete, do not issue to work order.</p>
Owner Plant	The Plant that has ownership or primary control of the part.
Part Type	<p>User defined code that can be used as selection criteria for the mass change procedure.</p> <p>Valid codes can be defined in the Code Administration procedure.</p>
Category	<p>User defined code that can be used to help group items for reporting purposes.</p> <p>Valid codes can be defined in the Code Administration procedure.</p>
Rev. Level	Revision Level of the item.
Rev. Date	Revision Date of the item.
Notes	Notes that have been entered for the item.
Explode One Level	“Yes” indicates to Explode one level when creating a work order.
Purchased Assembly	“Yes” indicates the assembly is to be configured as a “buy” part for costing purposes.
Delete Flag	“Yes” indicates the part is flagged for deletion.
Custom Fields	Custom fields are defined using NorthClark’s Bill of Material Setup procedure.
Made From	<p>Parts for outside processing not performed on a work order material.</p> <p>Part Number The part number that is supplied</p> <p>Quantity The quantity that is supplied</p>
Equivalents	<p>A listing of part numbers which may be used as equivalents</p> <p>Part Number The equivalent part number.</p> <p>Quantity The quantity required of the equivalent part.</p>

Planning

This view includes Master Scheduling and Material Requirements Planning parameters.

The screenshot shows the 'Part Number Search' application window with the '4-Planning' tab selected. The window title is 'Part Number Search' and it has a menu bar with 'File', 'Edit', 'View', and 'Help'. Below the menu bar is a toolbar with icons for file operations and a search icon. The main area is divided into several sections:

- Planning:**
 - Make/Buy:
 - Planner Code:
 - Days Supply:
 - MPS:
 - Plan Fence:
 - Forecast Type:
 - Order Qty:
 - MRP:
 - Demand Fence:
 - Order Policy:
 - Order Multiple:
 - Detailed Pegging:
 - Routing:
 - Yield%:
 - Auto Release:
 - Buy Guide:
- Lead Time:**
 - Planning:
 - Assembly / Buy:
 - Total Lead Time:
 - Cumulative:
- Part Period Balancing:**
 - Cost Group:
 - Place \$:
 - Place %:
 - 2nd Policy:
 - Setup \$:
 - Setup %:
 - Days Plan:
 - Carrying \$:
 - Carrying %:

At the bottom of the window, the status bar shows 'Part: 1001 - MOTOR, 2HP' and 'Account: MDEM05.11'.

Planning Parameters:

Make/Buy	Defines whether MRP will explode requirements. MRP will not explode buy items.
Plan Fence	A period of time, in days, when it is unfeasible to alter the master schedule or WO's.
Demand Fence	A period of time, in days, when the sales forecast is consumed entirely by backlog.
Routing	Routing Identifier (BOO File).
Planner Code	Code used to indicate who is responsible for planning this part.
Forecast Type	Sales Forecasting Type Code (S)pare or (F)inished Goods

Order Policy	Order Policy Code for the part used for MPS/MRP processing D = Discrete (actual need) F = Fixed (minimum quantity over need) L = Least Total Cost P = Part Period Balancing T = Time Phased (need + need for 'x' days)
Days Supply	The number of days that the Order Qty must cover requirements.
Order Qty	The minimum Order Quantity of each item.
Order Multiple	Order quantities will be suggested in multiples of this quantity.
Yield%	Standard yield or shrinkage factor.
MPS?	“Yes” indicates that the item is processed by MPS.
MRP?	“Yes” indicates that the item is processed by MRP.
Detailed Pegging	“Yes” indicates that MRP will maintain detailed pegging for the item.
Auto Release	“Yes” allows the Planner System to automatically launch live orders.
Buy Guide	“Yes” indicates that the part will be reported on the buying guide.

Lead Time

Planning	Number of days required to plan the part.
Assembly / Buy	Number of days required to assemble or purchase the part.
Total Lead Time	Total lead-time for the part.
Cumulative	Calculated by adding the longest Total Lead-Time at each level of the structure.

Part Period Balancing

Cost Group	Cost Group used to determine the unit cost for Part Period Balancing.
2 nd Policy	Secondary PPB Policy Code (D)iscrete, (F)ixed, or (P)art Period Balancing.

Days Plan	Number of days after which to switch to PPB 2 nd Policy.
Place \$	Dollar amount of Order Placement Cost.
Setup \$	The dollar cost per order to set up for production.
Carrying \$	Cost per unit per day held in inventory.
Place %	Percentage of overall unit cost for Order Placement.
Setup %	Percentage of overall unit cost for Setup.
Carrying %	Percentage of overall unit cost for holding the item in inventory.

Material

This view displays material control information.

The screenshot shows a software window titled "Part Number Search" with a menu bar (File, Edit, View, Help) and a toolbar. Below the toolbar is a navigation bar with tabs: 1-Search, 2-Results, 3-Eng., 4-Planning, 5-Material (selected), 6-Purch, 7-Mrk, and 8-On Hand. The main area displays material control settings for "Part: 1001 - MOTOR, 2HP" (Account: MDEM05.11). The settings are as follows:

QA Inspection Required: <input type="text" value="Yes"/>	Fractional Qty's OK: <input type="text" value="No"/>	QA Spec Code: <input type="text"/>
QA Report Required: <input type="text" value="Yes"/>	Stockable Phantom: <input type="text" value="No"/>	Safety Stock: <input type="text" value="0.00"/>
Serial Controlled: <input type="text" value="No"/>	Auto W/O Close: <input type="text" value="No"/>	Max Inventory: <input type="text" value="0.00"/>
Lot Controlled: <input type="text" value="No"/>	Freeze ABC: <input type="text" value="No"/>	Shelf Life: <input type="text"/>
		ABC Code: <input type="text" value="D"/>

Material Control Fields:

QA Inspection Required	Defines whether the QA System will be used for this part.
QA Report Required	“Y” indicates that QA reports will be printed for this part
Serial Controlled	“Y” indicates that transactions for the part will require serial numbers.
Lot Controlled	“Y” indicates that transactions for the part will require lot numbers
Fractional Qty's OK	"Y" indicates that this part may be stocked or used with a fractional quantity
Stockable Phantom	“Y” indicates that this phantom assembly may be stocked.
Auto WO Close	“Y” indicates work orders for this item will automatically close at month end.
Freeze ABC	“Y” indicates the ABC code will not be updated by stratification (PARTS05)
QA Spec Code	The specification code from the QA.SPEC File for this part.
Safety Stock	The minimum quantity that should always be maintained in stock.
Max Inventory	If Min-Max planning is used; this is the maximum inventory level.
Shelf Life	The number of days the item may remain in inventory before expiration.
ABC Code	Alphabetic category for cycle counting frequency of this item.

Purchasing

This view displays Purchasing parameters for the part.

General Purchasing Information

Buyer Code	The individual normally responsible for buying this item.
Tax Type	User defined default code to define whether the item is taxable or not.
Load Factor	Factor for distributing estimated freight costs.
Price Conv	Conversion Factor used when Unit Price is not equal to Buy Unit of Measure.
Forecast Part	If “Y”, the part will be included in the Vendor Forecast Report.
Fcst PO/SPO	If the part is a Forecast Part the code specifies which planned order time period is used.

Supplier Information

In addition to manual entry, supplier information is updated automatically by activity that occurs when creating or updating a Purchase Order, PO Receipt or an Accounts Payable invoice. All suppliers that have been entered or have had activity will appear on the list.

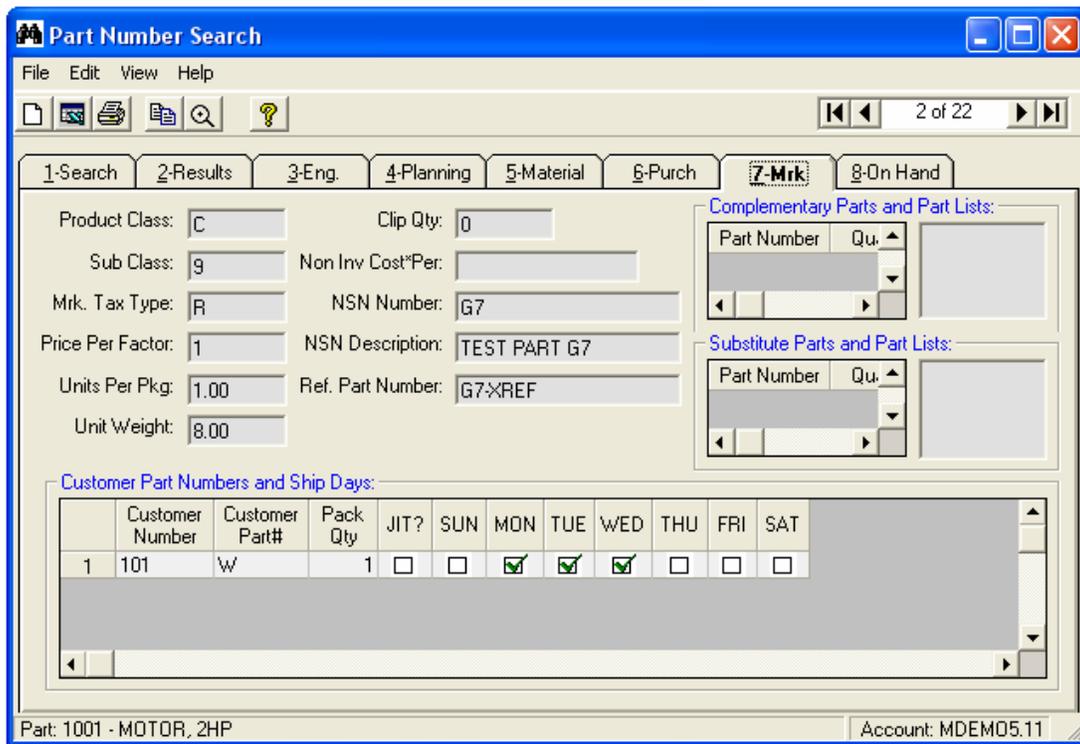
Vendor Number	Ship from vendor number.
Vendor Name	Supplier name
Vendor Description	Supplier's description of the part.
Order Multiple	The number of units the vendor usually packages together.
Buy U/M	Purchase unit of measure and factor needed to convert to stocking unit of measure.
Buy U/M Factor	Factor required to convert the Buy U/M to the Stocking U/M.
Vendor Cost	Last cost paid to the vendor.
Price Per	Number of units included in prices quoted for this part and vendor.
Unit Freight	Estimated freight cost per vendor unit.
Last Cost*Source	Source transaction of the last cost information. Information displayed is the transaction date, transaction ID number, and type of transaction (PO, RC, AP)
Mfg. Name and Part #	A list of manufacturers name and associated part numbers that may be supplied by the vendor.
Plant Code	The PLANT code associated with this part.
Composite Rating	This is the composite vendor performance rating for this part and this vendor.

Approved Manufacturer Fields

If Approved Manufacturer features are utilized, a listing of the approved manufacturer ID, manufacturer part number, manufacturer name and notes will be displayed.

Marketing

This view displays Sales and Marketing parameters.



Marketing Fields:

Product Class	User defined Product Classification assigned to the part.
Sub Class	User defined Product Sub-Classification assigned to the part.
Mrk Tax Type	Tax Type Code to define the billing taxable or non-taxable default for the part.
Price Per Factor	Default for SOE to express the price of this part per a specified number of units
Units Per Pkg	Number of units of this part normally shipped in a single package.
Unit Weight	Weight per part for the standard unit of measure.
Clip Qty	Used by the Buying Guide and Sales Forecasting to lower abnormally high demand.
Non Inv Cost*Per	Unit cost for this item on non-inventory shipments.

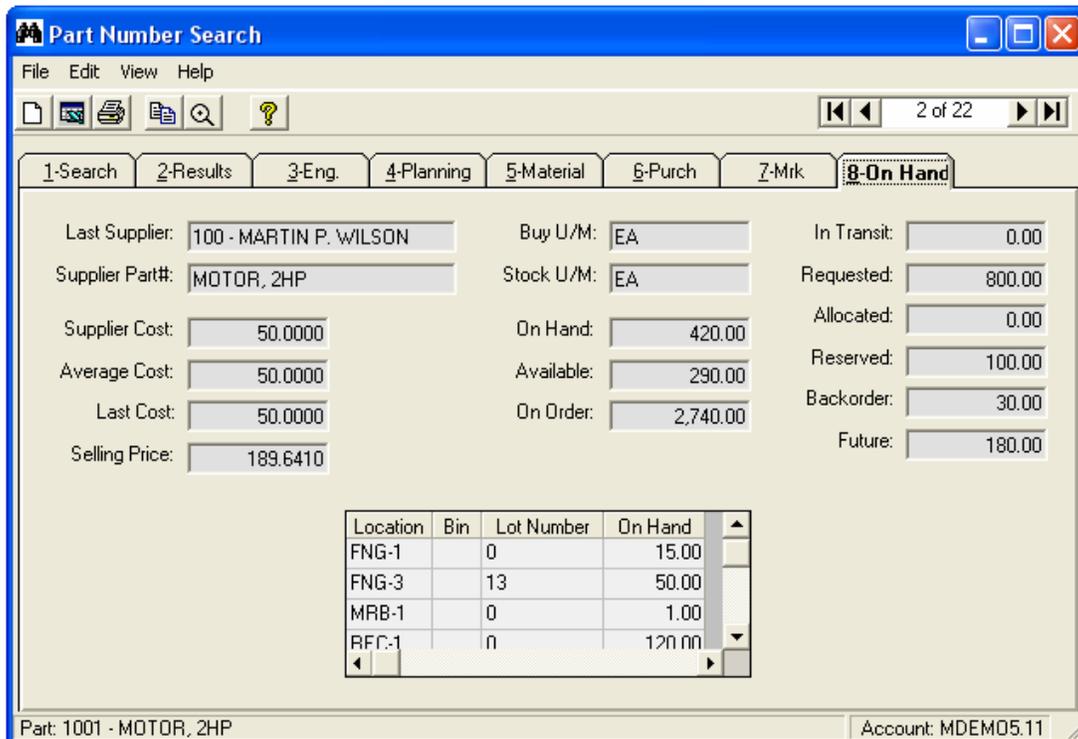
NSN Number	U.S. Department of Defense, National Stock Number assigned to the part.
NSN Description	Description assigned by the U.S. Government to this NSN part number.
Ref Part Number	An internal alternate part number that has been assigned to this item.
Complementary Parts and Parts List	Complementary Parts and Parts List assigned to this item and used during SOE.
Substitute Parts and Parts List	Substitute Parts and Parts List assigned to this item and used during SOE.

Customer Shipping Requirement Information

If you have entered specific Customer shipping requirement information for the part, the information will be displayed as follows. This information includes the Customer number, Customer's Part #, the Packaging Quantity, whether the item is a JIT part for EDI purposes, and which days are authorized ship days.

On Hand

The quantities displayed include all stocking locations chosen using the Inventory Locations option found on the View Menu.



On-Hand Inventory Information:

Last Supplier	The vendor number and name associated with the most recent PO Receipt.
Supplier Part#	The vendor's part number, associated with the last supplier.
Buy U/M	The unit of measure that is used when purchasing the part.
Stock U/M	The unit of measure that is used for stocking the part in inventory.
Supplier Cost	The last unit cost paid to the supplier for this part.
Average Cost	This is an average cost based on information contained in the COSTHIST file.
Last Cost	The last actual P.O. or work order cost.
Selling Price	The generic selling price that has been defined in the PRICE file.

Inventory Status Information

Stock U/M	The standard issue unit of measure that is used to stock and transact the item.
On Hand	Quantity on hand in the physical stock locations specified.
Available	On Hand Qty less Allocated and Reserved Qty (optionally less Backorder Qty).
On Order	Quantity of the part due to be received on a PO or released WO.
In Transit	Quantity that has been shipped on a transfer requisition and not yet received.
Requested	Quantity requested on a purchase requisition, unreleased WO or transfer req.
Allocated	Quantity currently allocated to sales orders or transfer requisitions.
Reserved	Quantity currently reserved for sales orders and work orders.
Backorder	Quantity backordered for sales orders and work orders.
Future	Quantity on sales orders or work orders with a future schedule date.

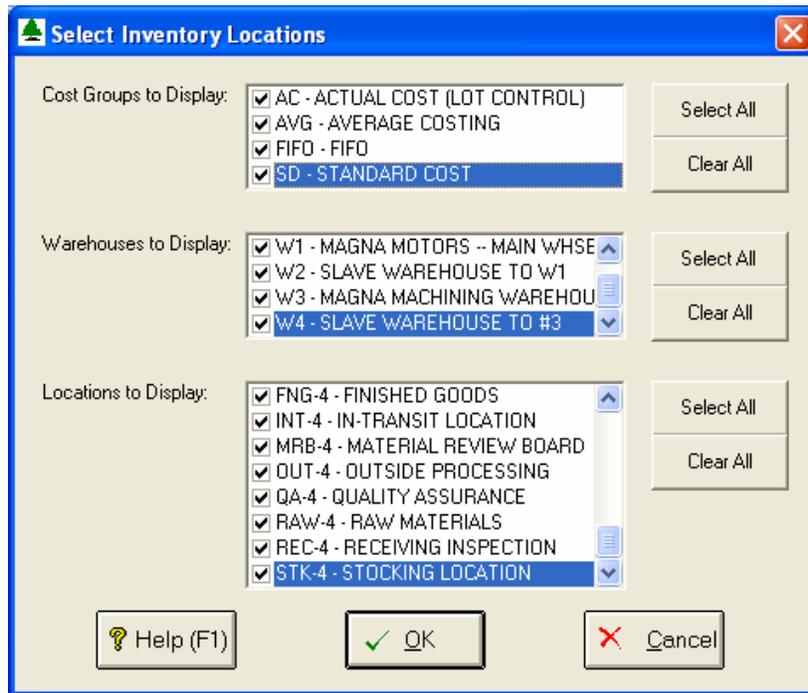
Bin Location Information

If you utilize bin locations, the bin location details will be displayed for the physical locations that are designated as Multi-Bin “Y” in your Inventory Location file. Detail for locations that are not designated as Multi-Bin will not be displayed.

The information that will be displayed is the physical Inventory Stocking Location, the Bin Location within that Stocking Location, the Lot Number (as applicable) and the associated On Hand Quantity.

Selecting Inventory Locations

Select the Inventory Locations option from the View menu to modify the list of locations to be used in the calculation of On-hand and Available Inventory.



General Information

Main Menu Options

The following options are available from the Main Menu of the Part Number Search Query.

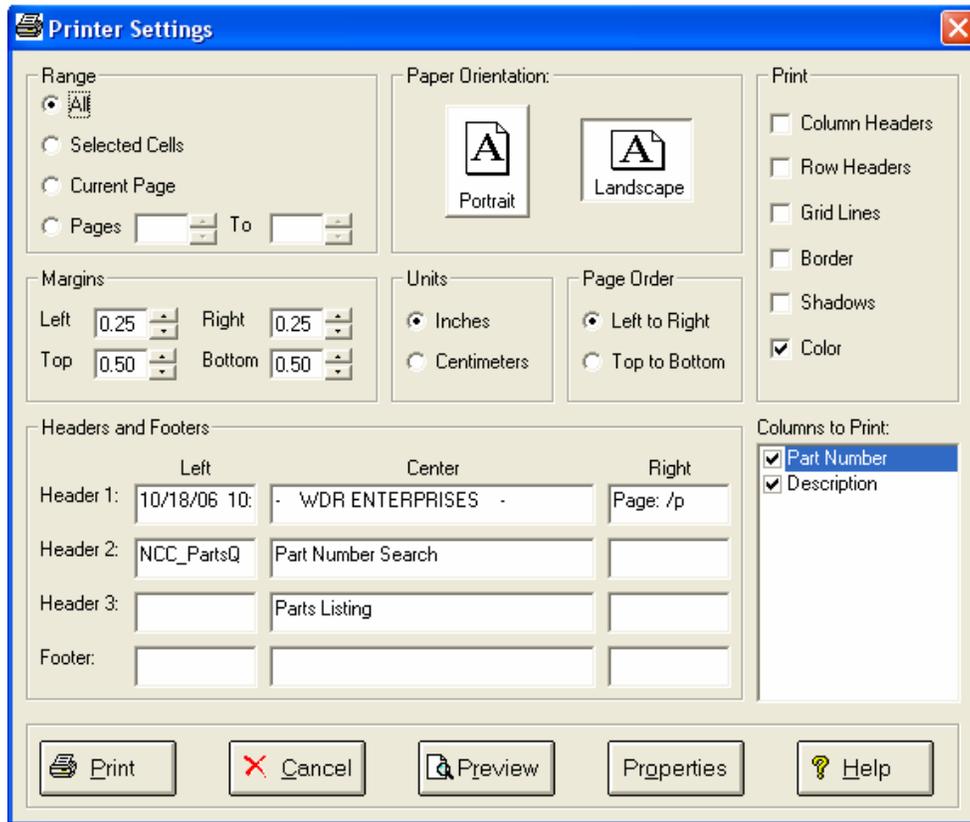
Menu	Option	Description
File	Login	Logs user into the procedure.
File	Clear	Clear all current data on all displays.
File	Print	Print the current active spreadsheet.
File	Export	Export data from the active spreadsheet.
File	Exit	Close the application
Edit	Copy	Copy data to the Windows clipboard.
Edit	Zoom	View, print and/or edit the expanded contents of a field.
View	Unhide All Columns	Expose all columns previously hidden.
View	Auto Fit Columns	Automatically adjust the width of each column to accommodate your data.
View	User Preferences	Set user preferences affecting the contents and appearance of the screen.
View	Inventory Locations	Select Inventory Locations.

Right Click Menu

Copy	Copy data to the Windows clipboard.
Cut	Cut data from the field and copy it to the Windows clipboard.
Paste	Paste data from the Windows clipboard.
Fill	Update all of the selected cells from the Windows clipboard.
Zoom	View, print and/or edit the expanded contents of a field

Printing a Spreadsheet

This option will print the current active spreadsheet, so be sure to click on the spreadsheet you wish to print before choosing the Print option.



Range - Selecting a Print Range: You may choose to print the entire spreadsheet (all), selected cells (those that you have highlighted on the current screen), the current page (only the rows that are currently visible on your screen), or a range of page numbers.

Orientation - Portrait or Landscape: You may print your report in portrait mode (normal) or landscape mode (sideways). Printing in landscape mode will allow you to fit more columns of information on your report.

Margins - Report Margins: You can make your report more attractive by setting the top, bottom, left, and right margins. Reduce the left and right margins if you need to fit more columns on the report.

Units - Inches or Centimeters? Are the margins you entered expressed in inches or centimeters?

Page Order: If your report is too wide, it may span multiple pages. When this occurs, do you want the report printed from top to bottom or left to right?

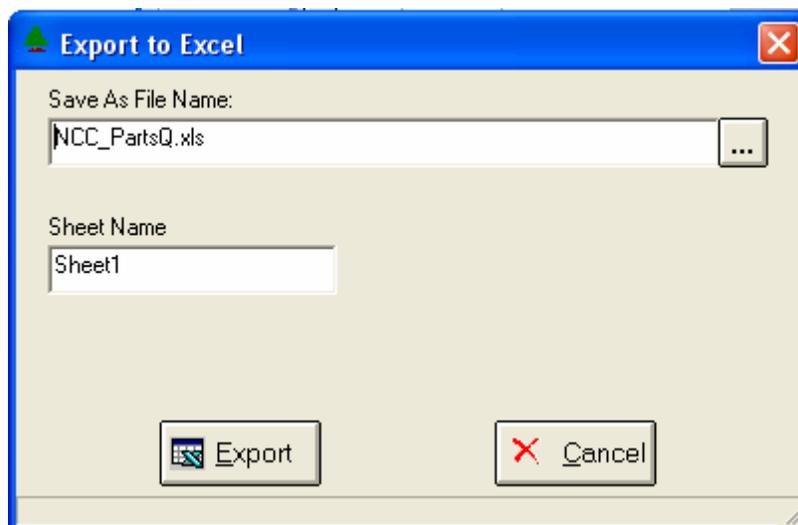
What Do You Want to Print? You can customize the appearance of your report by printing (or not printing) column headers, row headers, grid lines, borders, shadow, and color.

Headers and Footers: Your report may have up to three lines for the heading, and one line for the footer. The system initially displays a default heading, which you may modify if desired. *Tip:* Use /p to designate a page number.

Which Columns Do You Want to Print? The columns that are available for printing are listed. Select the columns you wish to include on your report.

Exporting a Spreadsheet to Excel

Below is a sample of the screen that will appear when you select the **Export to Excel** option. This will export the current active spreadsheet, so be sure to click on the spreadsheet you wish to print before choosing the Export option.



Save As File Name: Enter the pathname of the file you wish to create. You may Browse the files by clicking the button to locate the drive and folder where the file will be stored.

Sheet Name: Enter the Excel sheet name to create. This will automatically default to Sheet1.

Export Button: After all required information has been entered, click this button to export your data to Microsoft Excel.

Editing Features

Copy, Cut, Paste and Fill

You may use the standard Windows Copy, Cut, and Paste features to copy data to the Windows clipboard, or to paste data from the clipboard into a cell.

To copy data, hold down the left mouse button and highlight one or more cells, then choose **Copy**. There are multiple ways to enter this command:

1. From the **Edit** menu choose **Copy**.
2. Click the **Right Mouse** button, and then choose **Copy** from the pop-up menu.
3. Click the corresponding icon on the toolbar.
4. Hold down the **Ctrl** key and type the letter **C** (**Ctrl-C**).

You can use the Cut command (Ctrl-X) and the Paste command (Ctrl-V) in similar fashion.

To copy the contents of an entire row, click once on the row header (the number displayed on the left side of the first cell), and then choose **Copy**. Now click on the row header that you want to copy the data to and choose **Paste**.

If you want to update several cells with the same value, highlight all of the cells you wish to update then choose **Fill Cells**. This command will update each cell with the current information from the clipboard.

Zoom

This feature allows you to view, print and/or edit the expanded contents of a field. It is especially useful for multi-line information such as notes and long descriptions.

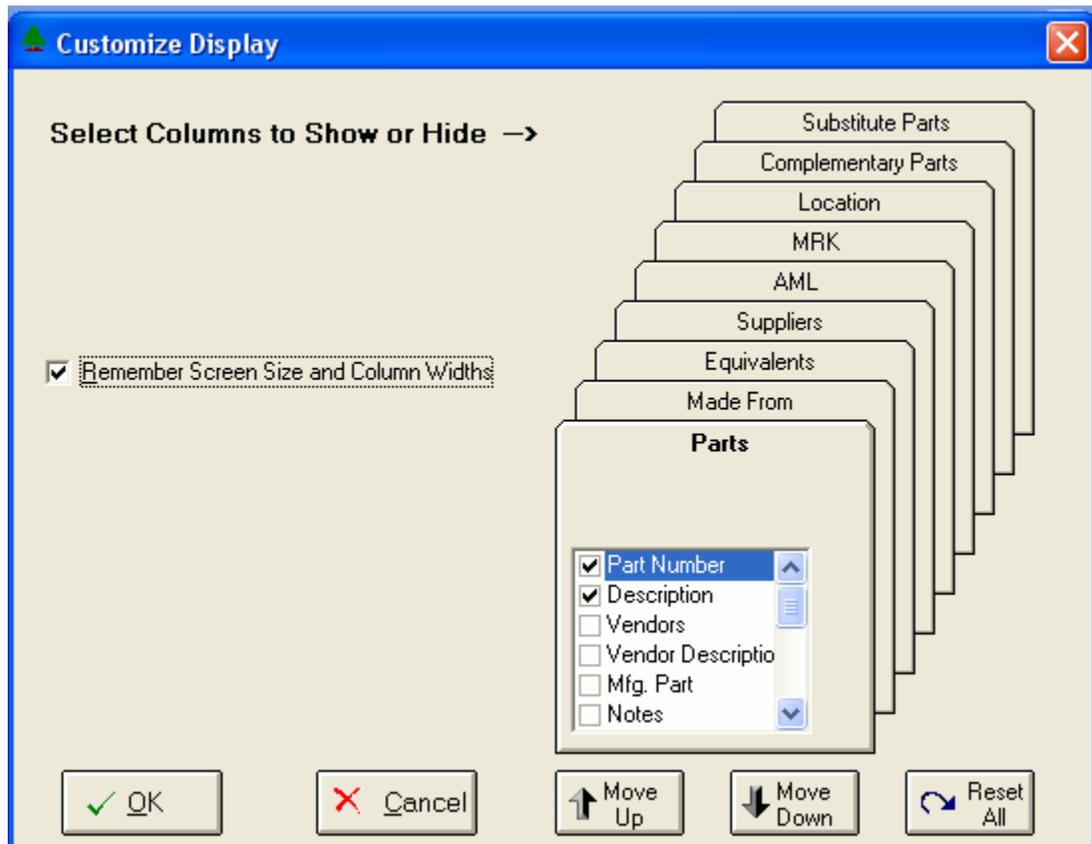
- You may "Zoom in" on any selected item by selecting Zoom from the Edit Menu, clicking the magnifying glass on the toolbar, or selecting Zoom from the right click menu.
- The Column Name will appear in the Title Bar with "Edit" or "View". You may edit the field when it is allowed. Click "**OK**" when finished, or "**Cancel**" to revert to the original data.
- To print the selected item, click on the printer icon and the information will be sent to your local printer.

Locked fields may be viewed but not modified using the Zoom Feature. If the field is locked, "**View**" will appear in the Title Bar, and there will only be a single command button labeled "**Done**".

Customizing Your Display / Arranging Columns

Use the User Preferences screen to make the following changes:

- ❑ Each tab contains a list of fields that corresponds to a screens used in this application. Use the checkboxes to show or hide each field.
- ❑ Use the [Move Up] and [Move Down] Buttons to re-arrange the order in which the fields appear on the specific screen Display. Click [Reset All] to return to the system's default settings.
- ❑ You may opt for the system to "Remember Screen Size and Column Widths". Any changes you make to the screen's appearance will be saved and applied the next time you launch this application.
- ❑ Click [OK] to apply any changes you have made or [Cancel] to revert to the previous settings.



Note, these settings are stored in the Windows Registry for each user.

Wildcarding

Wildcarding is a powerful feature that allows you to search using a portion of the field. You tell the system you want to use a wildcard by typing three periods “...” or an asterisk “*” at the beginning or end of your search entry. You can also use “+” and “;” to include and/or conditions. Here are some examples of search commands and their expected results:

...MOTOR... or *MOTOR*	Search for the word “Motor” anywhere in the field
MOTOR+*FAN*	Both “Motor” and “Fan” must appear in the field
MOTOR; *FAN*	Either “Motor” or “Fan” must appear in the field

Security

Access to NorthClark applications is governed by the Manfact security system. The System Administrator must add the appropriate commands to each user’s security table. Please refer to the Manfact documentation for more information on setting up security tables.

The following NorthClark procedures may be added to the Manfact security tables:

Routine	Description
NCC_PARTSQ	Allows access to all views within the Part Number Search Query.
NCC_PARTSQ_STK	User is limited to the Search, Results, and On-hand views.



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